



Issue 44 (2007)
October 27- November 1, 2007

Part 1: News Analysis

Turkmenistan celebrated the 16th anniversary of its independence on October 27 -- its first under anyone but President Saparmurat Niyazov (r. 1991-2006). -- virtually without a trace of the images and references to the "Great Turkmenbashi," but with traditional patriotic and pro-presidential pomp. President Gurbanguly Berdimukhamedov presided over a military parade under an enormous illuminated portrait of himself as children danced in traditional Turkmen dress and lines of marching workers chanted "Glory to you, Our Beloved President," and "Glory to the President of Independent and Permanently Neutral Turkmenistan." As is customary, the Cabinet of Ministers presented the president with a Turkmen race horse.

On the eve of Independence Day, President Berdimukhamedov held an emblematic conference with many of the country's principal current foreign investors in the energy and construction sectors. The announcement this week of the discovery of a new gas deposit in Southern Yoletan fields also added luster to the occasion. The Turkmen leader received the heads of the three major Russian oil companies interested in further prospecting as well as securing existing commitments to gas deliveries: Soyuzneftegas, Itera and Gazprom. He also met with representatives of Frunze Sumskoye Machine-Building, a major Ukrainian firm helping to provide gas-related technology; the heads of the joint Russian-British venture TNK-British Petroleum; leading Belgian industrialists; France's Bouygues; and representatives of Turkey's Polymex and Kotam Enterprises, which have been assisting Turkmenistan with major construction projects and the textile industry, respectively.

Itera is building a carbide factory; Belgium's ENTEX is outlining plans for producing clean energy-saving technology and has helped educate Turkmen oil and gas specialists; and Gazprom has spent \$20 million to construct the Turkmen-Russian Pushkin School in Ashgabat, and is holding the Turkmen president to his promise of opening the school next fall. Much as foreign investors felt compelled to present President Niyazov with a translation of his book *Ruhnama* (Book of the Soul), today's investors feel pressured to commit to invest in President Berdimukhamedov's signature project, the Avaza tourist zone on the Caspian coast.

Gazprom only obliquely referenced in these meetings the long-awaited Russian-Turkmen-Kazakh tripartite agreement to begin construction and renovation of the Caspian pipeline, noting that Gazprom was not responsible for any delays.

President Berdimukhamedov is preparing for his trip to Brussels November 5-6 which he said indicated "a new stage of partnership" between Europe and Turkmenistan.

Part 2: News Digest

Summary: President Berdymukhamedov celebrated the 16th anniversary of Turkmenistan's independence without portraits of his predecessor Saparmurat Niyazov for the first time, but with lavish public praise of his own leadership. He met with top executives from oil and gas companies from Russia, Ukraine, the UK, and Belgium, and from Turkish construction and textile firms, and was upbeat about his trip to meet with EU officials next week.

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1. INTERNATIONAL RELATIONS

a. Turkmen President Says Chinese Premier's Visit "Important Step" for Cooperation

Source: BBC Monitoring--Asia Pacific/China News Agency Xinhua/10/26/07

Original title: Construction of Gas Pipeline Between Turkmenistan, China Will Promote Regional Development: Turkmen President.

Turkmen President Berdymukhamedov said in the capital city Ashgabat October 26 that the construction of a Turkmenistan-China natural gas pipeline would be an important factor in regional stability and development, BBC Monitoring reported, citing Xinhua.

The president expressed satisfaction over the development of bilateral relations with China, saying that Chinese Premier Wen Jiabao's upcoming visit to Turkmenistan would be an important step for promoting bilateral cooperation. According to Berdymukhamedov, bilateral cooperation between the two countries in various fields including energy, textiles, transportation and communications would be high on the agenda during Wen's visit. China National Petroleum Corporation (CNPC) signed a production sharing contract and a gas sales and purchase agreement with Turkmenistan in July to import 30 billion cubic meters of gas annually through the planned Central Asia Gas Pipeline for 30 years.

b. Turkmen Leader Upbeat on Cooperation with EU Ahead of Visit to Brussels

Source: ITAR-TASS/10/25/07. Synopsis by OSI Turkmenistan Project.

Excerpt: Cooperation with Europe is a key priority for Turkmenistan's foreign political strategy, President Berdymukhamedov told his government's deputy premiers regarding his forthcoming visit to the EU headquarters in Brussels on 5-6 November, ITAR-TASS reported

"The visit will lay a foundation for a new stage of partnership between Turkmenistan and the EU member states," the Turkmen leader was quoted as saying.

c. Turkmen President Meets Ukrainian Foreign Minister

Source: turkmenistan.ru/10/27/07. Synopsis prepared by OSI Turkmenistan Project

Full version: http://www.turkmenistan.ru/?page_id=3&lang_id=en&elem_id=11423&type=event&sort=date_desc

Synopsis: Turkmen President Berdymukhamedov received a government delegation from Ukraine headed by Foreign Ministry Arseniy Yatsenyuk October 26, turkmenistan.ru reported, citing the State News Agency (TDH). The Foreign Minister conveyed Ukrainian President Viktor Yushchenko's message of congratulations on the occasion of Turkmenistan's 16th anniversary of independence. The two countries pledged to further develop their cooperation and discussed progress on joint projects. Construction of a bridge over the Amu-Darya River has resumed; a gas compressor station is also being built and other underground engineering projects are being discussed. The Ukrainian government is strictly monitoring the implementation of these projects, the Ukrainian Foreign Minister said and also proposing cooperation in the area of education.

2. DOMESTIC DEVELOPMENTS

a. Turkmenistan Celebrates Independence Day

Original title: Turkmen Independence Show Glorifies Leader.

Source: BBC Monitoring--Central Asia/10/27/07/TV Altyn Assyr/10/26/07

Festivities marking the 16th anniversary of Turkmenistan's independence have turned into glorification of the country's current president, Gurbanguly Berdymukhamedov, BBC Monitoring Central Asia reported, citing TV Altyn Assyr. At a big show on 26 October at Ashgabat's Olympics stadium, with thousands of students, officials and foreign guests attending, Berdymukhamedov's large portrait illuminated with colored lights was placed above the rostrum. The presenter's voice amplified by powerful equipment glorified the president from the very beginning of the show broadcast live by all four state- owned TV channels.

"Under your leadership, the Turkmen people is heading towards new heights, and our nation has been united around you as never before. Our spirits are exalted and people are grateful to you for all these achievements. May God the Great grant you even bigger successes and strongest health," the presenter said, addressing Berdymukhamedov who was not visible to those present.

The TV showed various performances by students and pop singers, sports teams and acrobatic groups, accompanied by computerized multimedia video and sound effects. Children were shown dancing and chanting "Glory to you, our beloved president." Thousands of balloons were released into air, as people chorused, "Glory to the president of independent and permanently neutral Turkmenistan." The live transmission which started without prior notice at 1300 GMT, ended an hour and forty minutes later, with the TV channels shifting to their scheduled programs.

b. Turkmen Leader Attends Independence Day Military Parade

Source: BBC Monitoring--Central Asia/10/27/07/TV Altyn Assyr/10/27/07

The new Turkmen leader has for the first time attended a military parade since his election as president in February of this year. At 0500 GMT on 27 October, Turkmen TV started broadcasting live a military parade dedicated to Independence Day. Turkmen President Gurbanguly Berdymukhamedov was shown standing on a covered platform. The parade was a copy of the scenario of military shows that used to be held during the era of the late Turkmen president, Saparmurat Niyazov, who died on 21 December 2006. The show started with the defense minister's report to the president on the readiness of troops for the parade. It was followed by the raising of the state flag and the performance of the Turkmen national anthem. Then the troops took an oath of loyalty to the president.

The military parade was opened with servicemen marching from various units saluting and shouting "Nation, Homeland, the Supreme Commander". Then, units of tanks and armored personnel carriers, tanks, heavy trucks, artillery, anti-missile equipment and various hardware entered the square. This was followed by fighter aircraft and helicopters flying over the square. The military parade, which lasted for about 25 minutes and ended with a demonstration of the guard of honor and military orchestra, was followed by horse riders demonstrating their equestrian skills. A horse was presented as a gift to President Gurbanguly Berdymukhamedov on the occasion of Independence Day by members of the Cabinet of Ministers. Thus, the tradition of presenting a horse to the president inherited from Niyazov's era continued.

After this ceremony, motorcycle outriders opened theatrical performances, and plays and dances by representatives from big enterprises, departments and regions of Turkmenistan began. Several modern dances were performed in contrast to exclusively Turkmen national dances, which used to be performed only in national dress during such events.

c. Turkmen Signs Agreement with World Health Organization

Original title: Government of Turkmenistan and European Bureau of World Health Organization Sign Cooperation Agreement.

Synopsis by OSI Turkmenistan Project.

Source: turkmenistan.ru/10/31/07

Full version: http://www.turkmenistan.ru/?page_id=3&lang_id=en&elem_id=11459&type=event&sort=date_desc

Synopsis: The government of Turkmenistan and the European bureau of the World Health Organization (WHO) have signed a cooperation agreement for 2008-2009, turkmenistan.ru reported. The Ministry of Health and Pharmaceutical Industry of Turkmenistan said that WHO will continue to provide Turkmenistan not only with educational materials but also funds for necessary laboratory equipment, chemical reagents, and medicine. The two-year program of cooperation is based on national healthcare priorities within the context of WHO's global tasks. These include combatting infections and noninfectious diseases, including malaria, tuberculosis, HIV-AIDS and others, as well as comprehensive immunization, maternity and child care, the pharmaceutical industry, advocacy of a healthy life-style and other priorities.

3. ECONOMIC NEWS

a. President Berdymukhamedov Receives 3 Russian Oil Business Leaders

Original Title: On the Eve of Independence Day of Turkmenistan, President Gurbanguly Berdymukhamedov Holds Meetings with Representatives of Business Circles of Several Foreign Countries: President of Turkmenistan Receives Chairman of the Council of Union of Oil and Gas Industrialists of Russia; President Receives Head of International Group Itera; President Receives High-Ranking Representative of Gazprom.. Translation and excerpt prepared by OSI Turkmenistan Project.

Source: Official Turkmen Government Website/10/26/07

Full version: <http://www.turkmenistan.gov.tm/en/?idr=1&id=071028e>

Excerpt: President Berdymukhamedov received Yuri Shafranik, the chair of the Council of the Union of Oil and Gas Industrialists of Russia, on October 26, the official government web site and the State News Agency (TDH) reported. Shafranik congratulated the Turkmen leader on the 16th anniversary of Turkmenistan's independence, and spoke of the wide prospects for cooperation, taking into account Turkmenistan's strategy for developing its energy and fuel sector. Shafranik expressed great interest in joint projects, specifically on developing hydrocarbon deposits on the Caspian Sea shelf. He noted the indisputable importance of the position of Turkmenistan articulated by Berdymukhamedov at the recent Tehran meeting of Caspian states, in advocating an equal and mutually profitable cooperation in the Caspian Sea. [Passage omitted congratulating Turkmenistan on discovery of new gas deposit in South Yolotan.]

President Berdymukhamedov expressed gratitude to the head of the Russian company for his active part in implementing major education reform and cooperation. Yuri Shafranik thanked the president for the trust shown and confirmed again the firm intention of Soyuzneftegas to work in the promising Turkmen market, which is of great interest to world business circles. Yuri Blatov, Russia's Ambassador to Turkmenistan, also took part in the meeting.

President Berdymukhamedov also received Igor Makarov of Itera, the international group of companies. [Passage omitted on congratulations]. The two sides approved a plan for joint work in the near future and discussed the implementation of major investment projects, the construction of a new carbide factory in the city of Turkmenbashi and a resort for Itera employees on the Caspian coast and also the prospect for Itera to develop iodide-bromide industry in Turkmenistan. They also confirmed their readiness to continue close cooperation in the traditional fuel and energy sphere and discussed the prospects for Itera to develop the rich oil and gas deposits on the Caspian shelf.

[Passages omitted on Makarov's intentions to expand in the Turkmen market, on construction sites readied for resort and carbide factory projects.]

Gurbanguly Berdymukhamedov expressed satisfaction at this information, and expressed confidence that many years of partnership will be built on the principles of trust, mutual benefit and strict performance of mutual obligations. The Russian ambassador Igor Blatov took part in the meeting.

President Berdymukhamedov received Valery Golubyov, deputy chair of the board of Russia's Gazprom. [Passage omitted on congratulations for independence day and discovery of gas in Southern Yoloten.]

The president emphasized the traditionally friendly nature of Turkmen-Russian partnership, whose most important direction is mutual cooperation in the fuel and energy sector. The two sides discussed cooperation in the gas sector, which has been successfully developed within the framework of a 25-year intergovernmental agreement, including deliveries of Turkmen gas to Russia. Emphasizing the mutual obligations undertaken, the sides exchanged opinions on the parameters and prospects for a strategic partnership taking into account its enormous potential. Particular attention was paid to the preparation of intergovernmental agreements to expand the gas transport system in Central Asia and construction of the Caspian pipeline. Golubyov confirmed that no delays were coming from Gazprom on this. The implementation of these projects, which have great significance for all participants, would enable the maximum opportunities for both gas routes for export of Turkmen gas to be utilized.

During the meeting Gazprom proposed to cooperate in the area of education including the incorporation of modern multi-media and information technology into the educational process. The two sides discussed the new Pushkin Turkmen-Russian school in Ashgabat, which is a unique symbol of friendship and the historical and spiritual closeness of two peoples. Golubyov noted that Gazprom had already transferred more than US

\$20 million to Turkmenistan for this project.[Passage omitted on other construction projects.] Golubyov said he was certain that the deadline established by the President of Turkmenistan -- early in the next school year -- the new school would be ready to accept students

b. Turkmen Leader Meets with Frunze Sumskiye Machine-Building Board Chairman

Original Title: *On the Eve of Independence Day of Turkmenistan, President Gurbanguly Berdimukhamedov Holds Meetings with Representatives of Business Circles of Several Foreign Countries: President Meets With Chairman of the Board of Frunze Sumskiye Machine-Building. Translation and excerpt prepared by OSI Turkmenistan Project.*

Source: Official Turkmen Government Website/10/26/07

Full version: <http://www.turkmenistan.gov.tm/en/?idr=1&id=071028e>

Excerpt: President Berdimukhamedov received Vladimir Lukyanenko, chairman of the board of a major Ukrainian industrial firm, Frunze Sumskiye Machine-Building. [Passage omitted on congratulations for Independence Day.]

The two discussed the high level of interaction of recent years. Lukyanenko said he sees his company's main purpose in Turkmenistan is to build critical facilities for the energy and fuel sector which is rapidly growing, and has won for Turkmenistan the deserved merit of an energy power. The Ukrainian company is observing projects underway with interest, and will direct its own efforts to strengthening the productive infrastructure of the oil and gas industry in Turkmenistan with the latest technology. The president expressed confidence that their cooperation will gradually develop and bring mutual benefit.

c. President Meets with Belgian ENEX and Schneider Electric

Original Title: *On the Eve of Independence Day of Turkmenistan, President Gurbanguly Berdimukhamedov Holds Meetings with Representatives of Business Circles of Several Foreign Countries: President Receives General Director of ENEX Process Engineering. Translation and excerpt prepared by OSI Turkmenistan Project.*

Source: Official Turkmen Government Website/10/26/07

Full version: <http://www.turkmenistan.gov.tm/en/?idr=1&id=071028e>

Excerpt: Laslo Markotan, senior vice president for the CIS and head of the Moscow branch of Schneider Electric, ENEX's partner and also Pierre Dirrige, director of business development. [Passages omitted on congratulations for Independence Day]. Minne emphasized the great interest that Belgium has, along with all the other countries of the European Union, in the Turkmen president's forthcoming visit to Brussels, and acknowledged the great honor of meeting the president of Turkmenistan on the eve of his visit.

The Turkmen leader noted the good results of ENEX's work in the Turkmen market for several years. ENEX has completed a number of construction and reconstruction jobs in the fuel and energy sector at the largest natural gas deposits. Through the efforts of Belgian partners, Turkmen specialists have also been educated. Minne outlined specific proposals to increase bilateral business contacts, including the development of clean energy-saving technology. Turkmenistan said that it had all the necessary resources to build a factor to produce cerium, an element which is used in solar batteries, noting that there were only five such factories in the world. The president expressed great interest in the project and said it would be studied seriously. Minne also reported on previous agreements, including readiness to bring on line a compressor station built at Dovletabad-3 in time for Turkmenistan's Flag Day. He also noted that ENEX would have a booth in the traditional International Oil and Gas in Turkmenistan exhibition.

Minne and his partners noted the favorable investment climate created in Turkmenistan for the successful development of business and emphasized the high interest leading European industrialists had in establishing close long-term business ties with Turkmenistan. [Passage omitted on wishes for successful visit to Brussels.]

d. President Receives Director of TNK-BP

Original Title: *On the Eve of Independence Day of Turkmenistan, President Gurbanguly Berdimukhamedov Holds Meetings with Representatives of Business Circles of Several Foreign Countries: President Receives Director of TNK-BP. Translation and excerpt prepared by OSI Turkmenistan Project.*

Source: Official Turkmen Government Website/10/26/07

Full version: <http://www.turkmenistan.gov.tm/en/?idr=1&id=071028e>

Excerpt: President Berdymukhamedov received Robert Dudley, chairman of the board of the largest Russian-British company TNK-BP (British Petroleum). [Passage omitted on congratulations for Independence Day].

The head of state briefed his guest on Turkmenistan's reform programs, paying particular attention to the future coastal city of Turkmenbashi, where the Avaza National Tourist Zone has been created. Expressing great interest and readiness for mutually beneficial cooperation, Robert Dudley emphasized the exceptional prospects for the Turkmen market, including the favorable investment climate, political stability and of course the wealth of hydrocarbon resources, in which TNK-BP intended to take a most active part in exploitation. As his company specializes in oil extraction, Dudley informed the president about the work done to establish close business relations with Turkmen partners. A recent exchange of visits had enabled Turkmen specialists to visit several fields being developed by the company and gain a fuller understanding about its prospects. Cooperation in the sphere of education is also growing. Dudley introduced the President to the head of the branch office of TNK-BP, which will open soon in Ashgabat.

Thanking his guest for his assistance, Berdymukhamedov proposed that TNK-BP review the opportunity to take part in projects to reconstruct and modernize the Seydi Oil Refinery and other major facilities. [Passage omitted on Turkmenistan as reliable partner.]

e. President Receives Head of Turkish Company Polymex.

Original Title: On the Eve of Independence Day of Turkmenistan, President Gurbanguly Berdymukhamedov Holds Meetings with Representatives of Business Circles of Several Foreign Countries: President Receives Head of Turkish Company Polymex. Translation and excerpt prepared by OSI Turkmenistan Project.

Source: Official Turkmen Government Website/10/26/07

Full version: <http://www.turkmenistan.gov.tm/en/?idr=1&id=071028e>

Excerpt: The president received Erol Tabanja, head of the well-known Turkish company, Polymex [Passage omitted on congratulations for Independence Day.]

The head of Polymex thanked the president for attending the opening ceremonies for laying the foundation of a number of new projects entrusted to Polymex. The Turkish businessman also listed the major construction projects under way and assured the president that all contractual obligations undertaken would be fulfilled.

The president urged acceleration of the project to build Archabil, part of the development of a resort area outside Ashgabat, and also the construction of a cement factory, given the need for this production by the national construction industry. Berdymukhamedov urged that Polymex, which had the requisite material and technical capacity, could speed up the development of the complex for ceremonies planned for the 20th anniversary of Independence Day.

Erol Tabanja reported on the work done on assignment from the head of state to create the national tourist zone on the Caspian coast. Speaking of the high interest of business circles in the new initiative from the Turkmen leader, the director of Polymex said that a number of foreign companies would be visiting Turkmenistan in the next month to discuss prospects for mutually beneficial cooperation. [Passage omitted on good wishes.]

f. President Receives Head of Turkish Company Kotam Enterprises

Original Title: On the Eve of Independence Day of Turkmenistan, President Gurbanguly Berdymukhamedov Holds Meetings with Representatives of Business Circles of Several Foreign Countries: President Receives Head of Turkish Company Kotam Enterprises. Translation and excerpt prepared by OSI Turkmenistan Project.

Source: Official Turkmen Government Website/10/26/07

Full version: <http://www.turkmenistan.gov.tm/en/?idr=1&id=071028e>

Excerpt: President Berdymukhamedov received Myamer Agym, the head of Kotam Enterprises, the Turkish company. [Passage omitted on congratulations for Independence Day.] The two sides discussed their many years of fruitful cooperation which has been a vivid example of a mutually-beneficial partnership on the basis of equal rights.

Agym noted that his company's representatives had been present at the opening of a cotton-processing factory in Abadan and were following with great interest the Turkmen leader's initiatives to develop the textile industry. Kotam Enterprises is ready to take the most active part. Agym introduced the president to several proposals to modernize the industrial giant Geoktep Textile Factory. [Passage omitted on president's appreciation of long-term cooperation.]

g. Turkmen President Receives Bouygues Executives

Source: turkmenistan.ru/10/28/07

Full version: http://www.turkmenistan.ru/?page_id=3&lang_id=en&elem_id=11434&type=event&sort=date_desc

Excerpt: President Berdymukhamedov received Olivier Bouygues, vice president of Bouygues, the French company, as well as senior vice president Aldo Carbonaro, regional projects director Charles Santer and commercial director Aleksey Reshov on October 28, turkmenistan.ru reported. The president discussed further cooperation, including a proposal for Bouygues architects to design a new memorial complex in Ashgabat for very special occasions, to be completed by the 20th anniversary of Turkmenistan's Independence.

Olivier Bouygues discussed the October 20 presentation at the Seidar Hotel of construction projects in Avaza, the national tourist zone on the Caspian coast. Bouygues also acknowledged that his firm's interest in Turkmenistan goes beyond urban planning, as industrial and fuel and energy projects were other areas of potential cooperation.

h. New Gas Flow Reached at South Yoleten Field in Turkmenistan

Original title: *New Flow of Natural Gas Obtained at Southern Yoleten Field. Synopsis prepared by OSI Turkmenistan Project.*

Source: turkmenistan.ru/10/26/07

Full version: http://www.turkmenistan.ru/?page_id=3&lang_id=en&elem_id=11413&type=event&sort=date_desc

Synopsis: A commercial flow of natural gas been reached at a depth of 4,600 m at well No. 103 in Southern Yoleten in Mary province, turkmenistan.ru reported. The state company Turkmenburgaz has been prospecting in the area. The field is expected to produce an extra 4 bcm of gas per year after going into operation in 2009. Another 14 wells are currently being drilled at Yoleten.

Another highly promising area, Osman, lies close to the Southern Yoleten field where an inflow of natural gas with daily flow rate of 5 mcm has recently been achieved at well No. 3 at a depth of 4,577 meters. According to preliminary estimates, the thickness of the productive layer totals 450-500 meters with air pressure of 540 atmospheres. This is much bigger than the hydrocarbon capacity of all fields being developed in Turkmenistan.

i. Turkmenistan Owes Iran \$170M on Dam: Iran

Original title: *Turkmenistan Owes Iran \$170M on Dam. Synopsis prepared by OSI Turkmenistan Project.*

Source: presstv.ir/10/28/07

Full version: <http://www.presstv.ir/detail.aspx?id=28924§ionid=3510213>

Synopsis: The joint project of building the Friendship Dam between Iran and Turkmenistan was completed two years ago, but Turkmenistan still owes Iran between \$160-\$170 million, Iran's presstv.ir reported. The dam lies between the Hari-Roud River, also known as the Tedzhen, on the border between the two countries. Iran's Energy Minister Rasoul Zargar said negotiations have been held on the dam, and the two countries are reviewing the costs of construction.

The estimates made by Iran are based on preliminary assessments. "In the near future, the two sides will settle their accounts and decide how much they owe," the minister was reported as saying.

Unless otherwise indicated, all translations have been prepared by OSI's Turkmenistan Project.

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